

- a. reading the dynamic document;
 - b. reading the filter from a dynamic document definition;
 - c. comparing a filter value to an appropriate field of the dynamic document;
 - d. displaying the dynamic document pointer if the filter value matches the appropriate field of the dynamic document;
 - e. determining whether the filter is a delete type filter; and
 - f. deleting any dynamic document pointer and its children if it is a delete type filter and the filter value matches the appropriate field of the dynamic document.
12. The method of claim 1, further comprising the step of executing a function on the management records.
13. The method of claim 12, wherein the step of executing a function further comprises the steps of:
- a. retrieving the dynamic document definition and a dynamic document instance;
 - b. retrieving a lowest level unprocessed display pane hierarchy level for the dynamic document definition;
 - c. retrieving a set of functions associated with the display pane;
 - d. executing each of the functions;
 - e. updating the dynamic document; and
 - f. updating a group by accumulator, wherein the group by accumulator stores a result corresponding to a calculation performed upon a group of data fields.
14. The method of claim 2, further comprising the step of executing a filter on the management records, the filter execution corresponding to a data selection, the filter specifying a set of data selection criteria.
15. The method of claim 14, wherein the step of executing a filter further comprises the steps of

- a. reading the management record pointer instance;
- b. reading the filter from a management record definition;
- c. comparing a filter value to an appropriate field of the management record pointer instance;
- d. displaying the management record pointer instance if the filter value matches the appropriate field of the management record pointer instance;
- e. determining whether the filter is a delete type filter; and
- f. deleting any management record pointer instance and its children if it is a delete type filter and the filter value matches the appropriate field of the management record pointer instance.

16. The method of claim 2, wherein the step of executing a function further comprises the steps of:

- a. retrieving a management record definition and a management record instance;
- b. retrieving a lowest level unprocessed management record pointer family for the management record definition;
- c. retrieving a set of functions associated with the management record pointer family;
- d. executing each function retrieved;
- e. updating the management record pointer instances corresponding to the management record pointer family;
- f. updating the parent management record pointer instances of other management record pointer families that use the function; and
- g. updating a group by accumulator, wherein the group by accumulator Stores a result corresponding to a calculation performed upon a group of data fields.

17. The method of claim 16, wherein the method maintains a pass sequence number that is incremented for each level of function nesting in a management record, and the step of

executing the function is performed a plurality of times equal in number to the pass sequence number.

18. The method of claim 16, wherein the method maintains a pass sequence number that is incremented for each level of function nesting in a dynamic document, and the step of executing the function is performed a plurality of times equal in number to the pass sequence number.
19. The method of claim 2, wherein the step of defining a dynamic document comprises the step of defining dynamic document pointers, said dynamic document pointers indicating the primary record types to be displayed.
20. The method of claim 19, the step of defining dynamic document pointers further comprises the steps of:
 - a. retrieving a dynamic document definition;
 - b. determining a highest hierarchy level display pane definition not yet processed, the display pane definition defining a display window;
 - c. reading the primary record type and a corresponding management record pointer family for the pane definition;
 - d. determining whether a display pane exists for the primary record type and the corresponding management record pointer family, the display pane corresponding to a display window; and
 - e. if the display pane does not exist, creating a display pane for the primary record type and the corresponding management record pointer family by joining management record pointer instances for this display pane and its parent display pane.
21. The method of claim 20, further comprising the step of executing filters before and after the step of creating a display pane.
22. The method of claim 20, further comprising the steps of:
 - a. determining whether any child display panes exist; and